



How to set up Monthly budgets in our app

Audio transcript

To use Monthly budgets, you need to be over 18 with an HSBC UK Current Account, or credit card, and have Spending insights switched on. Take control of your spending: set up Monthly budgets in our app for different categories and see when you're approaching your limits.

To get started, first log onto our app.

Select the 'Plan' tab to see the Monthly budgets tool. Then to activate Monthly Budgets, select 'View account'.

If you haven't already, turn on Spending insights, then select 'Continue'. Choose the accounts you want to see Spending insights on and select 'Next' to continue. Select 'Set a budget'.

Now, choose a category to create your budget. You can get an estimate of the average spending on your account to help you set your ideal Monthly budget. Fill in the amount and select save.

You can set as many Monthly budgets as you want and you'll get a confirmation showing them all. That's it! You can now view your Monthly budgets.

To edit or delete a budget, choose the budget you want to amend. Then select the three dots and follow the instructions.

To find out more about managing your money in our app visit

www.hsbc.co.uk/moneymanagement